

# MODULE 4

Guide to collecting information on Individual and Family (NPIs), Services, and Characteristics.



The Center for Applied  
Management Practices

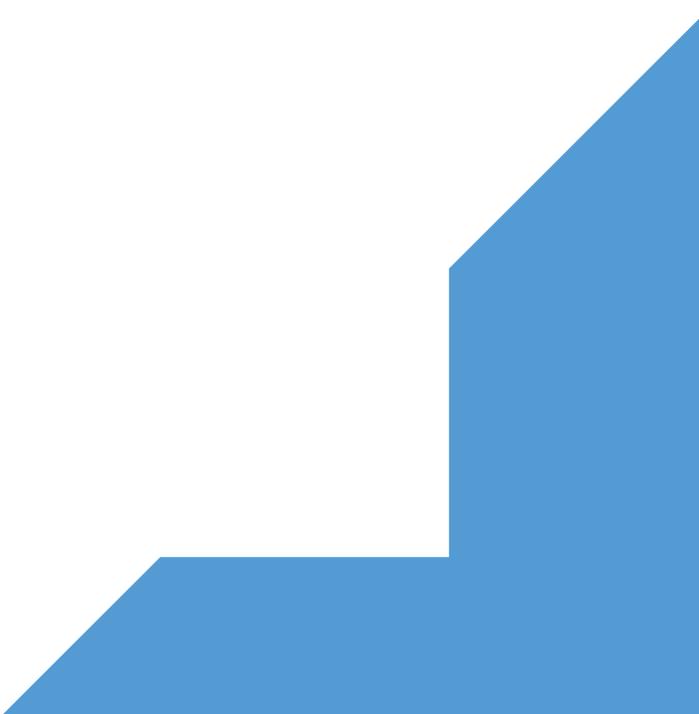


2024

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# MODULE 4

# INTRODUCTION

The Module 4 Report in eLogic Genesis is classified as a System Report. System Reports are intricate reports that have been produced by the eLogic Genesis development team and cannot be modified by agencies. Agencies have the ability to determine the specific criteria for filtering data in order to provide a report that aligns with the predefined CSBG specifications.

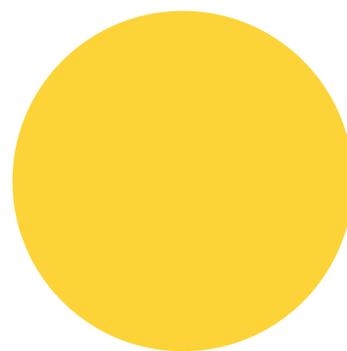


Section

System  
Domain  
Reports  
Statement  
Module  
Family  
Programs  
Services  
Demographics  
Movement

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# GENERAL REPORT **RUN**



# STEP 1

# LOGGING IN

eLogicGenesis

**Login**

Email

Password

Login

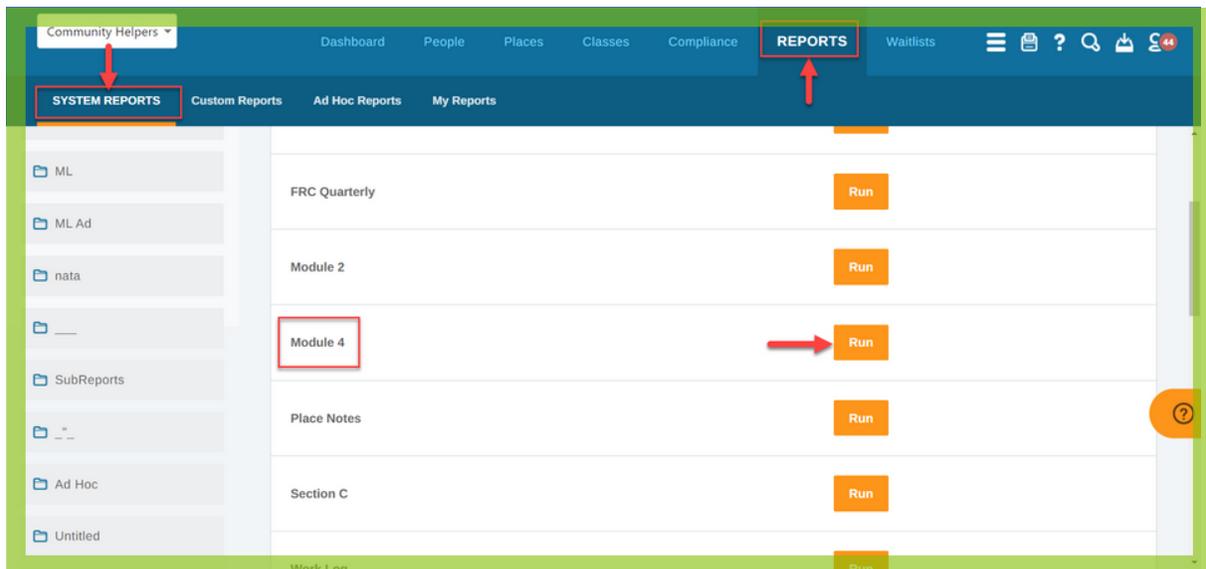
[Forgot password?](#)

For the best user experience, eLogic Genesis should be used with the Google Chrome browser.

Log into your eLogic Genesis account.

# STEP 2

## LOCATING REPORT



Click on the Reports tab, then click on the System Reports sub tab. Scroll down until you see Module 4, then click Run.

# STEP 3

## SETTING FILTERS

Community Helpers - Dashboard People Places Classes Compliance **REPORTS** Waitlists

Module 4 Report

**Set Report Filters?**

To not include a filter when you run the report, simply leave the filter options blank.

**Filter Combination Settings**

*Just to let you know, we've changed the default setting for filter combinations*

When using multiple date filters you can choose whether the returned data must match ALL of the filters or ANY of the filters. Set your preferred combination setting below.

Match ALL filters  Match ANY filters

**Client Created**

Start Date: mm/dd/yyyy End Date: mm/dd/yyyy Defined Date Period: Select an option...

**Client Assessed**

Start Date: mm/dd/yyyy End Date: mm/dd/yyyy Defined Date Period: Select an option...

Under Filter Combination Settings, select Match ANY filters.

# STEP 3 CONT'D

## SETTING FILTERS

Client Created ←

Client Assessed ←

Service Created

Service Started ←

Warning Indicator

Type to search ...

Run Report

For the report filters, scroll down select Client Created, Client Assessed, and Service Started. For each of the filters, enter a start and end date, or select a defined date period. Then click Run Report.

# STEP 4

## REPORT RESULTS

The screenshot displays the 'Module 4 Report' interface. At the top, there is a navigation bar with 'Community Helpers' and 'REPORTS' highlighted. Below the navigation bar, the 'Set Report Filters?' section includes a 'Change Filters' button and a 'Print' button. A red arrow points to the 'Print' button. Below the filter settings, there are three tabs: 'SECTION A - MOVEMENT', 'Section B - Services', and 'Section C - Demographics'. A red box highlights the 'SECTION A - MOVEMENT' tab, and a red arrow points to it. The 'Employment' domain is selected, showing a table with the following data:

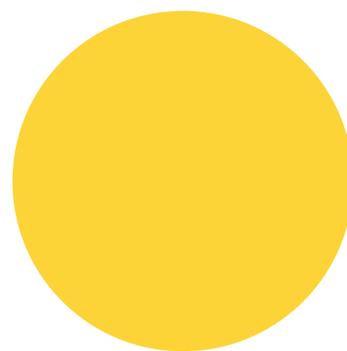
Statement	Number of Participants Served		
	Direct Outcome	Proxy Outcome	Both Outcomes
<b>FNPI 1a</b> The number of unemployed youth who obtained employment to gain skills or income.	1	0	0

After the report processes, click the Print button and save as a PDF.

Note: you must print and save each section of the report separately.

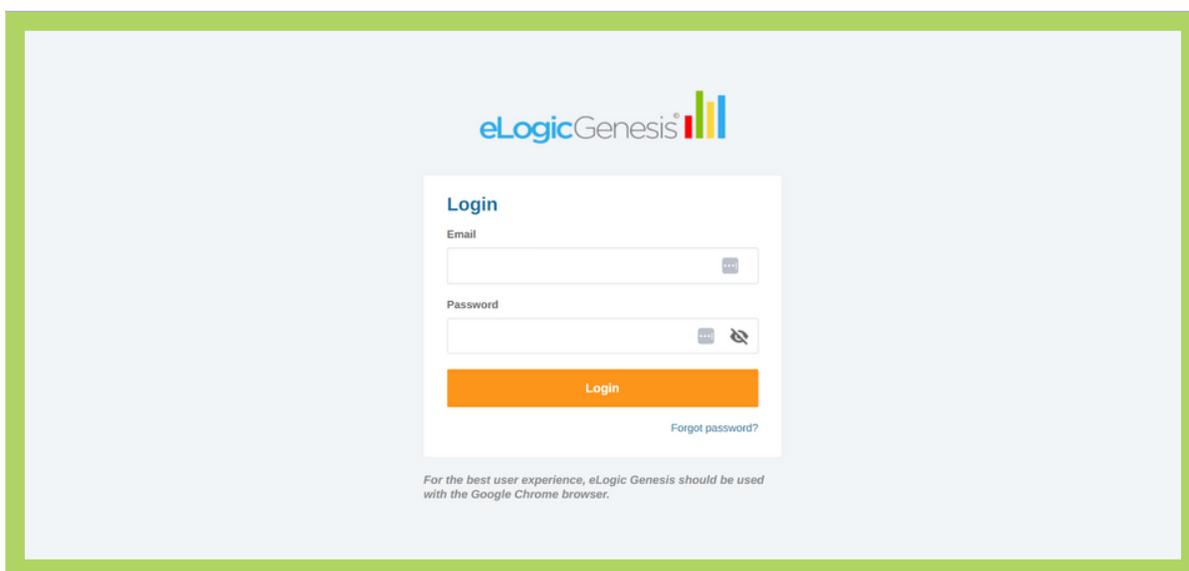
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# CARES REPORT **RUN**



# STEP 1

# LOGGING IN

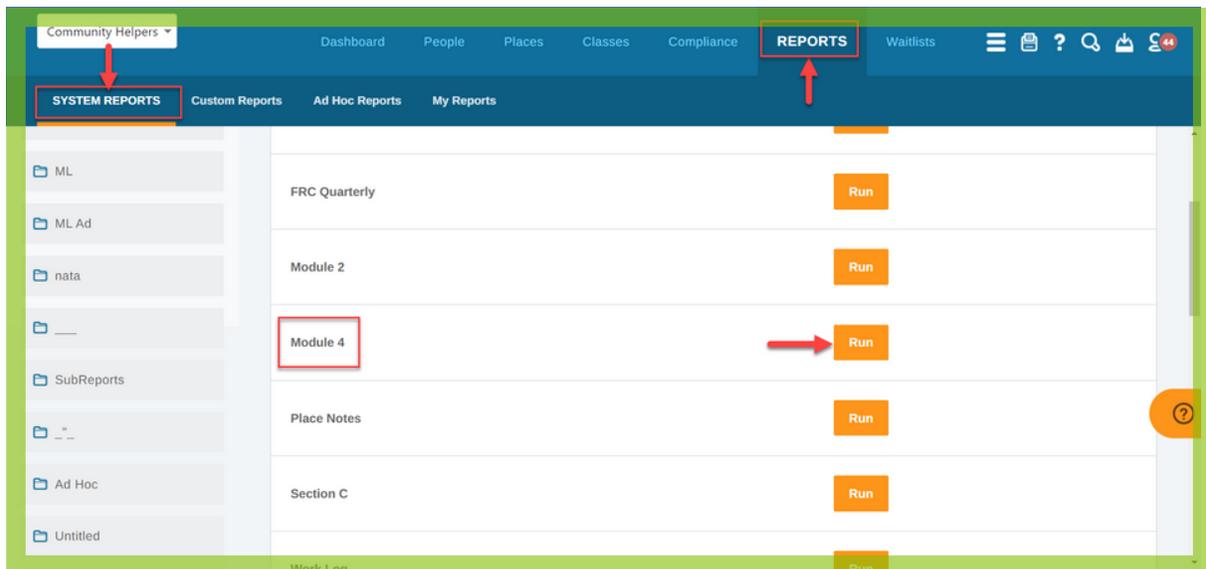


The screenshot shows the eLogic Genesis login interface. At the top center is the eLogic Genesis logo, which consists of the text "eLogicGenesis" followed by a stylized bar chart icon with three vertical bars in red, yellow, and blue. Below the logo is a white login form with a light gray border. The form is titled "Login" in bold blue text. It contains two input fields: "Email" and "Password". The "Email" field has a small gray icon of an envelope on the right side. The "Password" field has a small gray icon of a key and a small gray icon of a lock on the right side. Below the input fields is an orange "Login" button. At the bottom right of the form is a link that says "Forgot password?". Below the form, there is a small line of text: "For the best user experience, eLogic Genesis should be used with the Google Chrome browser."

Log into your eLogic Genesis account.

## STEP 2

# LOCATING REPORT



Click on the Reports tab, then click on the System Reports sub tab. Scroll down until you see Module 4, then click Run.

# STEP 3

## SETTING FILTERS

Community Helpers - Dashboard People Places Classes Compliance **REPORTS** Waitlists

Module 4 Report

### Set Report Filters?

To not include a filter when you run the report, simply leave the filter options blank.

**Filter Combination Settings**

*Just to let you know, we've changed the default setting for filter combinations*

When using multiple date filters you can choose whether the returned data must match ALL of the filters or ANY of the filters. Set your preferred combination setting below.

Match ALL filters  Match ANY filters

**Client Created**

Start Date: mm/dd/yyyy End Date: mm/dd/yyyy Defined Date Period: Select an option...

**Client Assessed**

Start Date: mm/dd/yyyy End Date: mm/dd/yyyy Defined Date Period: Select an option...

Under Filter Combination Settings, select Match ANY filters.

# STEP 3 CONT'D

## SETTING FILTERS

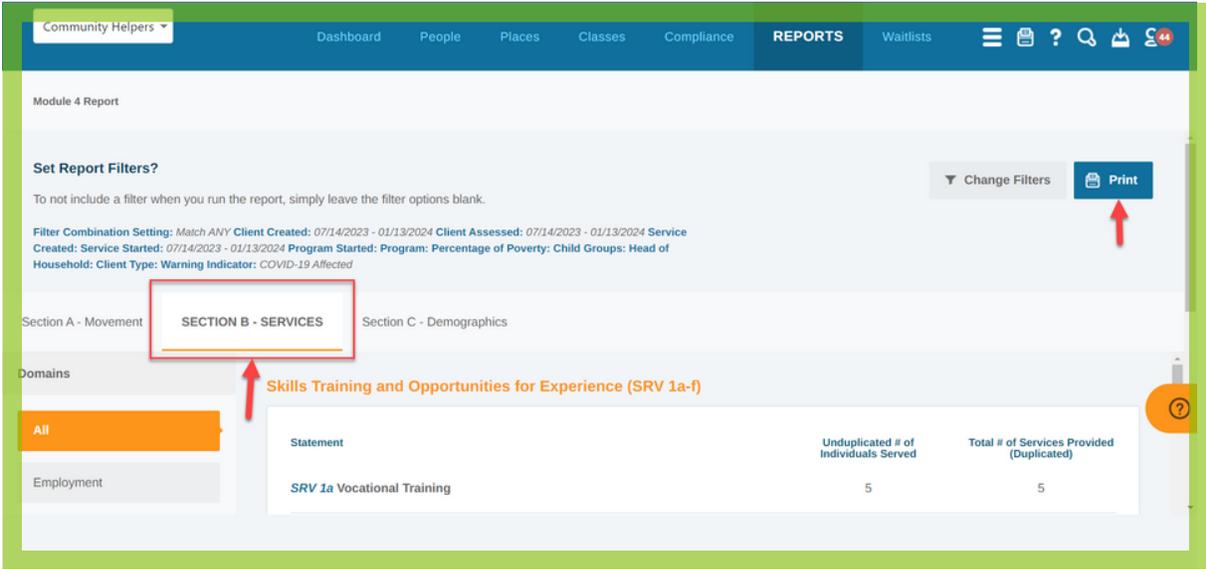
This screenshot shows the filter configuration for three report categories: Client Created, Client Assessed, and Service Started. Each category has a corresponding red arrow pointing to its label. For each category, there are three input options: Start Date (with a date picker icon and 'x' clear button), End Date (with a date picker icon and 'x' clear button), and Defined Date Period (with a dropdown menu showing 'Select an option...').

This screenshot shows the Warning Indicator filter section. A red arrow points to the 'Warning Indicator' label, and another red arrow points to the selected option 'COVID-19 Affected' in the dropdown menu. Below the dropdown is a search input field with the placeholder text 'Type to search ...'. At the bottom right, a red arrow points to the 'Run Report' button. A help icon (question mark in a circle) is visible on the right side of the panel.

For the report filters, select Client Created, Client Assessed, and Service Started. For each of the filters, enter a start and end date, or select a defined date period. Scroll down to the Warning Indicator filter, and select Covid-19 Affected. Then click Run Report.

# STEP 4

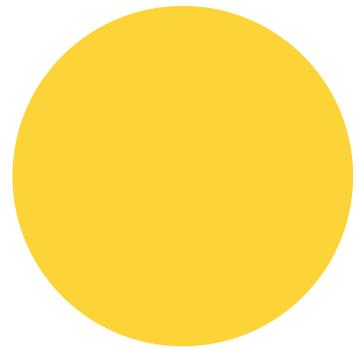
# REPORT RESULTS



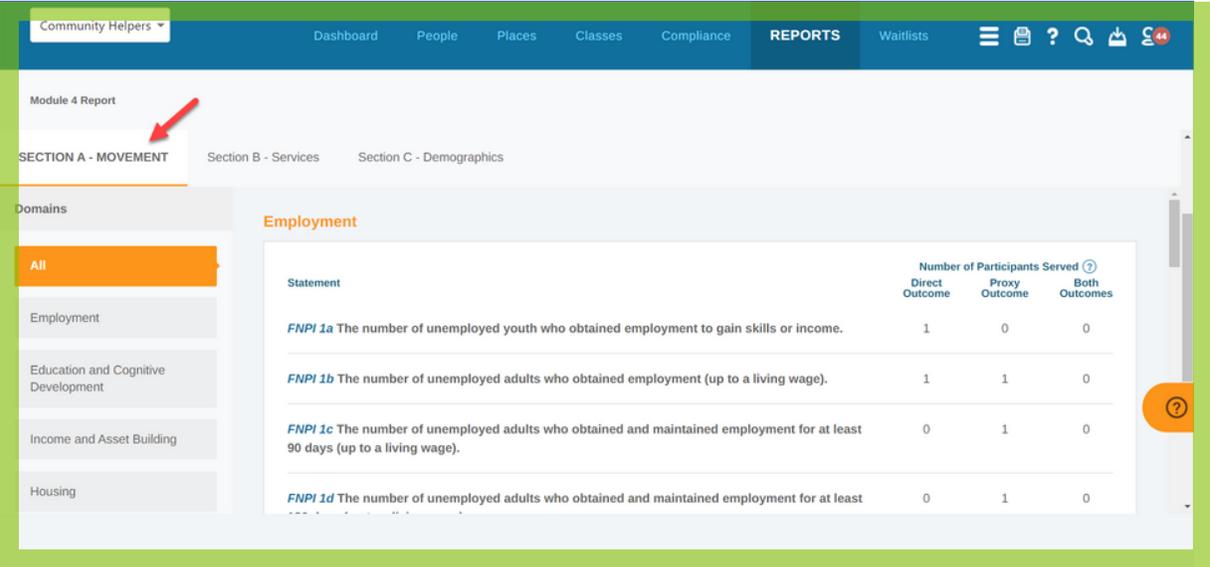
After the report processes, select the Section B - Services tab. Click the Print button and save as a PDF.

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# WHERE THE DATA **COMES FROM**

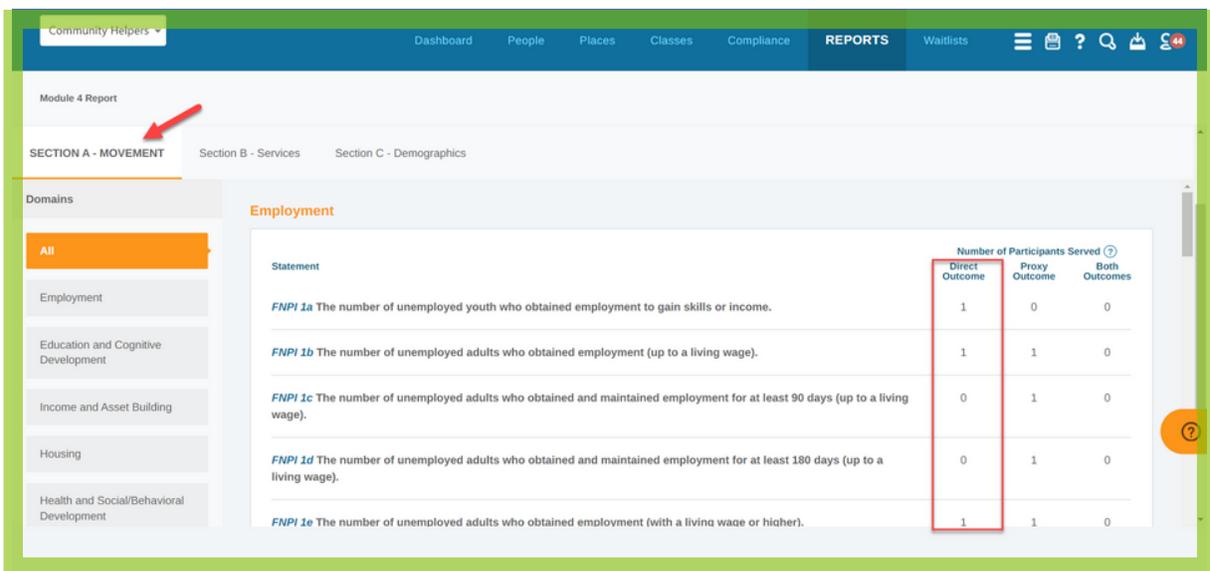


# SECTION A MOVEMENT



This section is comprised of clients who achieved Direct Outcomes, Proxy Outcomes, or Both Outcomes. Each statement represents an unduplicated individual count across each column.

# SECTION A, CONT'D MOVEMENT



To capture Direct Outcomes, clients need to be assessed and reassessed within the reporting period and, depending on the NPI, show positive movement or maintain outcomes.

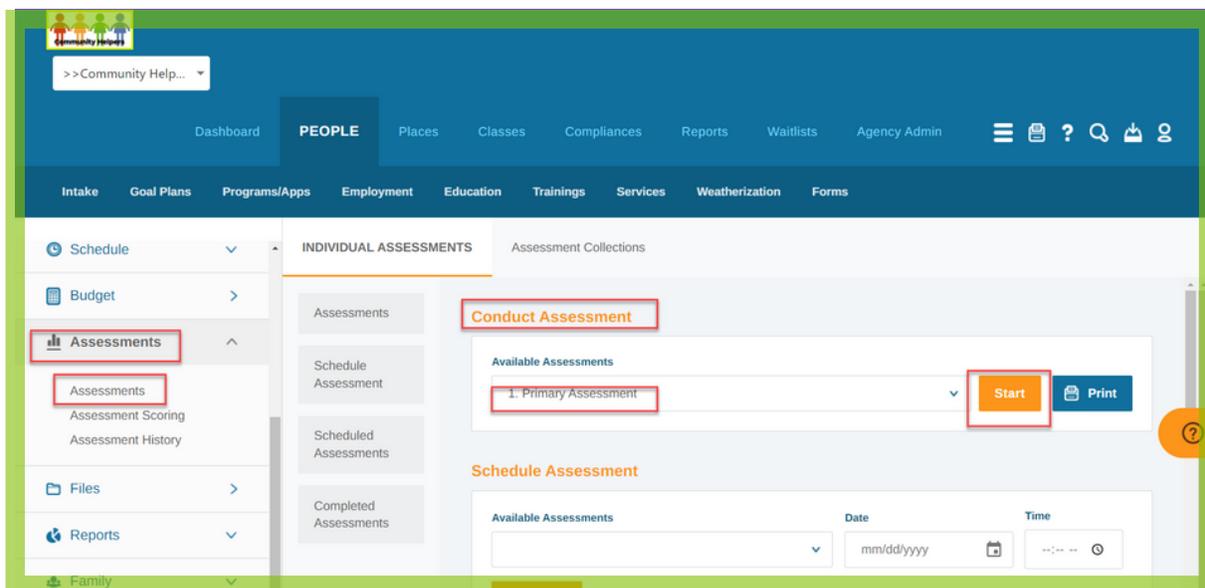
Clients are assessed with the Primary Intake Assessment and any Secondary Assessment. Clients need to be reassessed with the same scales within the reporting period in order for the report to be triggered.

All outcomes are coded by CAMP to trigger the report depending on specific factors.

N/A options do not count as starting outcomes and thus a new outcome must be selected for the starting.

# SECTION A, CONT'D

## MOVEMENT



It is recommended to set the Default Next Assessment Date to 3 months. This will automatically schedule a follow-up reassessment for that date. This is an eLG General Agency Admin setting.

- Client record→Assessments→Conduct Assessment→Primary Intake Assessment→Start
- Select the outcome
- Finalize
- Schedule for a follow-up reassessment of 3 months.

# SECTION A, CONT'D MOVEMENT

The screenshot shows a software interface for a 'Module 4 Report'. The navigation bar includes 'Community Helpers', 'Dashboard', 'People', 'Places', 'Classes', 'Compliance', 'REPORTS', and 'Waitlists'. The main content area is titled 'SECTION A - MOVEMENT' and is divided into three sections: 'SECTION A - MOVEMENT', 'Section B - Services', and 'Section C - Demographics'. A red arrow points to the 'SECTION A - MOVEMENT' tab. On the left, there is a 'Domains' sidebar with 'All' selected. The main content area displays an 'Employment' report with a table of outcomes.

Statement	Number of Participants Served		
	Direct Outcome	Proxy Outcome	Both Outcomes
<b>FNPI 1a</b> The number of unemployed youth who obtained employment to gain skills or income.	1	0	0
<b>FNPI 1b</b> The number of unemployed adults who obtained employment (up to a living wage).	1	1	0
<b>FNPI 1c</b> The number of unemployed adults who obtained and maintained employment for at least 90 days (up to a living wage).	0	1	0
<b>FNPI 1d</b> The number of unemployed adults who obtained and maintained employment for at least 180 days (up to a living wage).	0	1	0
<b>FNPI 1e</b> The number of unemployed adults who obtained employment (with a living wage or higher).	1	1	0

To capture Proxy Outcomes, clients are assigned specific and State-approved services that have been linked to NPIs.

# SECTION A, CONT'D

## MOVEMENT

The screenshot displays the 'SERVICES' page in a software application. The navigation menu at the top includes 'Dashboard', 'PEOPLE', 'Places', 'Classes', 'Compliance', 'Reports', 'Waitlists', 'Intake', 'Goal Plans', 'Programs/Apps', 'Employment', 'Education', 'Trainings', 'SERVICES', 'Weatherization', and 'Forms'. The 'SERVICES' tab is highlighted. On the left sidebar, the user profile for 'Brad Cooper' is visible, along with a 'COVID-19 Affected' status and a 'Created' timestamp. The main content area shows a 'Services' section with a search bar, date pickers for 'Start Date', 'End Date', and 'Checkup Date', and an 'Assign' button. A summary bar indicates 'Total Services - Count: 1 - Cost: \$0.00'. Below this is a table with columns for Name, Cost, Type, Domain, Scale, Status, and Start Date. The table contains one row: 'Bus Pass - Monthly' with a cost of \$0.00, Type 'Direct', Domain 'Transportation', Scale 'Quick', Status 'N/A', and Start Date '02/17/2023'.

Name	Cost	Type	Domain	Scale	Status	Start Date
Bus Pass - Monthly	\$0.00	Direct	Transportation	Quick	N/A	02/17/2023

Clients must have a service start date for the NPI defined service within the reporting period in order for the report to be triggered.

Client record → Services → Add New Service → select service from dropdown → check for accurate Start Date → Assign

All State-approved services are coded by CAMP to trigger the report depending on the service start date.

# SECTION A, CONT'D

## MOVEMENT

Community Helpers ▾

Dashboard People Places Classes Compliance **REPORTS** Waitlists

Module 4 Report

SECTION A - MOVEMENT Section B - Services Section C - Demographics

Domains

All

Employment

Education and Cognitive Development

Income and Asset Building

Housing

Health and Social/Behavioral Development

**Employment**

Statement	Number of Participants Served		
	Direct Outcome	Proxy Outcome	Both Outcomes
<b>FNPI 1a</b> The number of unemployed youth who obtained employment to gain skills or income.	1	0	0
<b>FNPI 1b</b> The number of unemployed adults who obtained employment (up to a living wage).	1	1	0
<b>FNPI 1c</b> The number of unemployed adults who obtained and maintained employment for at least 90 days (up to a living wage).	0	1	0
<b>FNPI 1d</b> The number of unemployed adults who obtained and maintained employment for at least 180 days (up to a living wage).	0	1	0
<b>FNPI 1e</b> The number of unemployed adults who obtained employment (with a living wage or higher).	1	1	0

To capture Both Outcomes, clients must satisfy the Direct Outcome rules, as well as the Proxy Outcome rules. If both are satisfied, the client will only appear in the Both Outcomes column.

Clients will only appear in either Direct Outcome, Proxy Outcome, or Both Outcomes; the client will never be counted in more than one column per statement. To calculate the total unduplicated individual count per statement, the Direct Outcome, Proxy Outcome, and Both Outcomes need to all be totaled together.

# SECTION B SERVICES

Community Helpers ▾ Dashboard People Places Classes Compliance **REPORTS** Waitlists

Module 4 Report

**Set Report Filters?** Change Filters Print

To not include a filter when you run the report, simply leave the filter options blank.

**Filter Combination Setting:** Match ANY Client Created: 07/15/2023 - 01/14/2024 Client Assessed: 07/15/2023 - 01/14/2024 Service Created: Service Started: 07/15/2023 - 01/14/2024 Program Started: Program: Percentage of Poverty: Child Groups: Head of Household: Client Type: Warning Indicator:

Section A - Movement **SECTION B - SERVICES** Section C - Demographics

Domains

All

Employment

Skills Training and Opportunities for Experience (SRV 1a-f)

Statement	Unduplicated # of Individuals Served	Total # of Services Provided (Duplicated)
SRV 1a Vocational Training	22	33

This section pulls in the unduplicated count of individuals who had a service start date fall within the reporting period. Services assigned to their appropriate SRV will trigger the report.

Clients are assigned services within their client record under Services. Service start date must fall within the reporting period.

SRV codes are assigned on the Agency Admin side of eLG.

# SECTION C DEMOGRAPHICS

Community Helpers

Dashboard People Places Classes Compliance **REPORTS** Waitlists

Module 4 Report

**Set Report Filters?**

To not include a filter when you run the report, simply leave the filter options blank.

Change Filters Print

Filter Combination Setting: Match ANY Client Created: 07/15/2023 - 01/14/2024 Client Assessed: 07/15/2023 - 01/14/2024 Service Created: Service Started: 07/15/2023 - 01/14/2024 Program Started: Program: Percentage of Poverty: Child Groups: Head of Household: Client Type: Warning Indicator:

Section A - Movement Section B - Services **SECTION C - DEMOGRAPHICS**

A. Total unduplicated number of all INDIVIDUALS about whom one or more characteristics were obtained: 69

B. Total unduplicated number of all HOUSEHOLDS about whom one or more characteristics were obtained: 53

Total unduplicated number of all INDIVIDUALS about whom one or more characteristics were obtained:

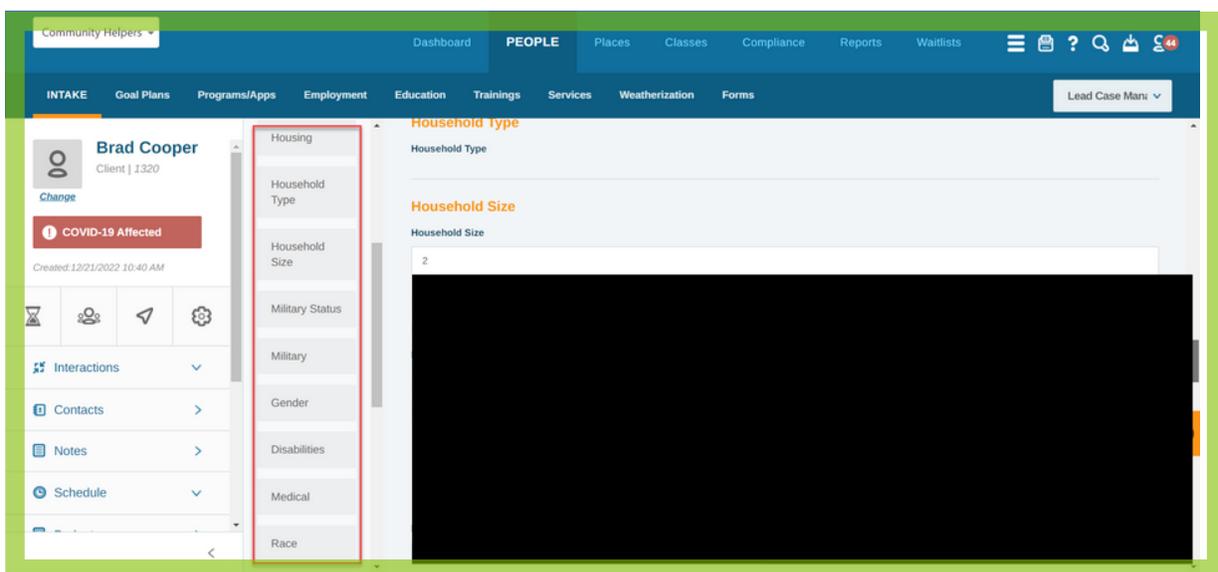
This includes all individuals

Total unduplicated number of all HOUSEHOLDS about whom one or more characteristics were obtained:

This is the HoH count.

# SECTION C, CONT'D

## DEMOGRAPHICS

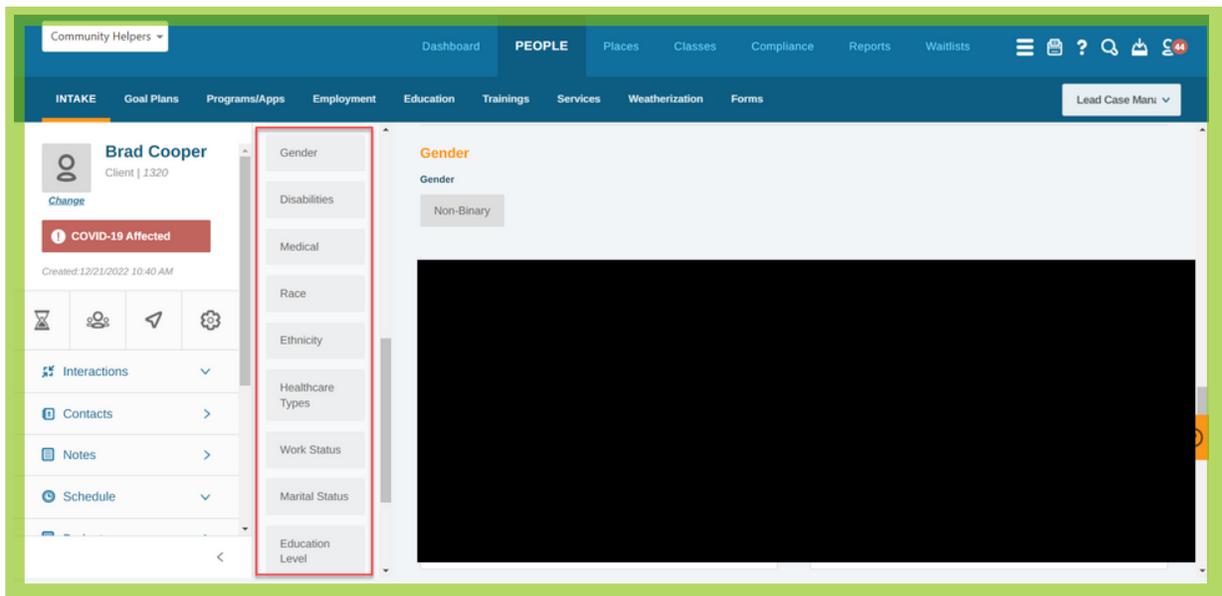


Client record→Intake→Select/Enter:

1. Gender
2. Age
  - a. Birth Date
3. Education Level
4. Disconnected Youth (Youth ages 14-24 who are neither working or in school)
5. Health
  - Disabling Condition - Disabilities
  - Health Insurance - Healthcare Types

# SECTION C, CONT'D

## DEMOGRAPHICS



6. CARES Clients→Warning Indicator - COVID-19 Affected (pictured)

7. Ethnicity/Race

- Ethnicity
- Race

8. Military Status (18+)

9. Work Status (18+)

# SECTION C, CONT'D

## DEMOGRAPHICS

The screenshot displays the eLogic Genesis interface for a client named Brad Cooper. The page is divided into several sections: a top navigation bar with 'Dashboard', 'PEOPLE', 'Places', 'Classes', 'Compliance', 'Reports', and 'Waitlists'; a secondary navigation bar with 'INTAKE', 'Goal Plans', 'Programs/Apps', 'Employment', 'Education', 'Trainings', 'Services', 'Weatherization', and 'Forms'; and a main content area. The main content area includes a client profile card for Brad Cooper (Client | 1320) with a 'COVID-19 Affected' status, a 'Created' timestamp, and a list of interaction types (Interactions, Contacts, Notes, Schedule). A central sidebar lists demographic categories: Ethnicity, Healthcare Types, Work Status, Marital Status, Education Level, Misc, Mental Health Information, and Warning Indicators. This sidebar is highlighted with a red border. The main content area contains a 'Misc' section with checkboxes for 'Disconnected Youth', 'Drivers License Checked', 'Income Tax Filed', and 'Property Tax Filed'. Below this is a 'Warning Indicators' section with checkboxes for '\*Employment Information Needed', 'Barred from Property', 'CLIENT/STAFF', and 'Contact Safety Manager'. There are also two large black redaction boxes covering parts of the page.

10. Household Type (HoH only)
11. Household Size (HoH only)
12. Housing (HoH only)
13. Percentage of Poverty (PoP) is updated annually within eLogic Genesis by CAMP. This percentage is calculated based on the number of family member records created in eLogic Genesis.

# SECTION C, CONT'D

## DEMOGRAPHICS

Community Helpers

Dashboard People Places Classes Compliance **REPORTS** Waitlists Agency Admin

Module 4 Report

### 3. Education Level

Options	# of Persons		
	Ages 14-24	Ages 25+	Missing DOB
Associate Degree	0	2	2
kinderagrdn	0	0	0
Other	2	1	1
Some College	0	1	0
Unknown/Not Reported	19	12	26
<b>Total</b>	<b>21</b>	<b>16</b>	<b>29</b>

### 8. Work Status

Options	# of Persons	
	Ages 18+	Missing DOB
Other	0	1
Veteran	0	1
Unknown/Not Reported	25	24
<b>Total</b>	<b>35</b>	<b>29</b>

8. Work Status

Options	# of Persons	
	Ages 18+	Missing DOB
Missing Data	35	29
<b>Total</b>	<b>35</b>	<b>29</b>

If unable to collect demographic information, select the Unknown/Not Reported field in the client's record. This client count will be reported under the Unknown/Not Reported dropdown→Unknown/not reported. If the field has been left blank, the client will be reported under the Unknown/Not Reported dropdown→Missing Data. Both the Unknown/not reported and Missing Data will be summed together by the report and listed next to the dropdown header Unknown/Not Reported.

# SECTION C, CONT'D

## DEMOGRAPHICS

Community Helpers ▾

Dashboard PEOPLE Places Classes Compliance Reports Waitlists

Intake Goal Plans Programs/Apps Employment Education Trainings Services Weatherization Forms

Income Options

No Sources of Income  Refused to Report Income

Exclude From Household Income

Employment - \$4.33 monthly

CSBG Eligibility Calculator - \$0.00 monthly, \$0.00 annually

Non-Cash Benefits - \$0.00 monthly, \$0.00 annually

Other Income Sources - \$0.00 monthly, \$0.00 annually

Save Changes

Budget Totals

Client Family

Income Types	
Gross Income:	\$52.00
Net Income:	\$52.00
Employment Wage:	\$52.00
Non-Cash Benefits:	\$0.00
Daily Income:	\$0.14
Weekly Income:	\$1.00
Monthly Income:	\$4.33

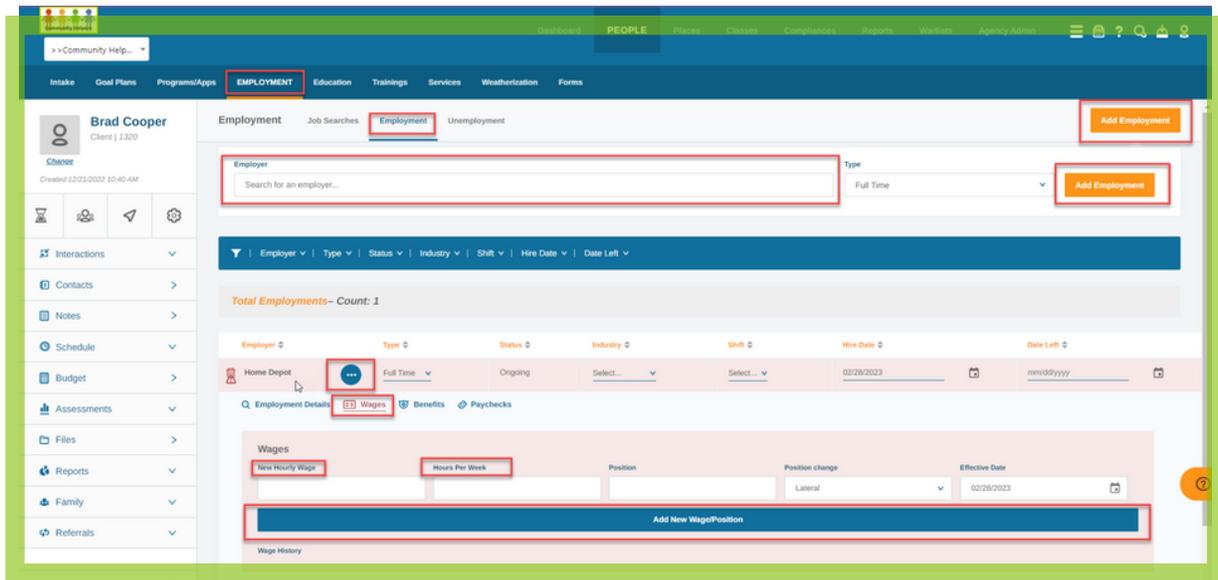
Pop Types

### 14. Sources of Household Income

- Other Income Sources
- Non-Cash Benefits (pictured)
  - Client record → Budget → Enter any Non-Cash Benefits and/or Other Income Sources → Select \$Add income source → Enter amount → Select Frequency → Save

# SECTION C, CONT'D

## DEMOGRAPHICS



- Income from employment only
  - Client record → Employment → Add Employment → Type Employer (select employer if dropdown appears or continue typing to create a new employer) → Add Employment → View Employment in table below → Select three dots “More” button → Select Wages → Enter New Hourly Wage and Hours Per Week → Click Add New Wage/Position → Save Changes.

# SECTION C, CONT'D

## DEMOGRAPHICS

The screenshot displays a software interface for budget management. The 'Budget' menu item is highlighted in red. The 'Income Options' section shows 'Employment' selected with a value of -\$4.33 monthly. The 'Budget Totals' section shows a monthly income of \$4.33.

Budget Totals	
Client	Family
Income Types	
Gross Income:	\$52.00
Net Income:	\$52.00
Employment Wage:	\$52.00
Non-Cash Benefits:	\$0.00
Daily Income:	\$0.14
Weekly Income:	\$1.00
Monthly Income:	\$4.33

View Employment information within Budget section - not editable within Budget section.

If no income select, No Income Source. If refused to report income, select Refused to Report Income.

Family member records need to be created - include demographic information, budget information, assign any needed services, conduct any needed assessments.



# The Center for Applied **Management Practices**

Innovative, affordable software and  
training solutions.

<https://ellogicgenesis.zendesk.com/hc/en-us>